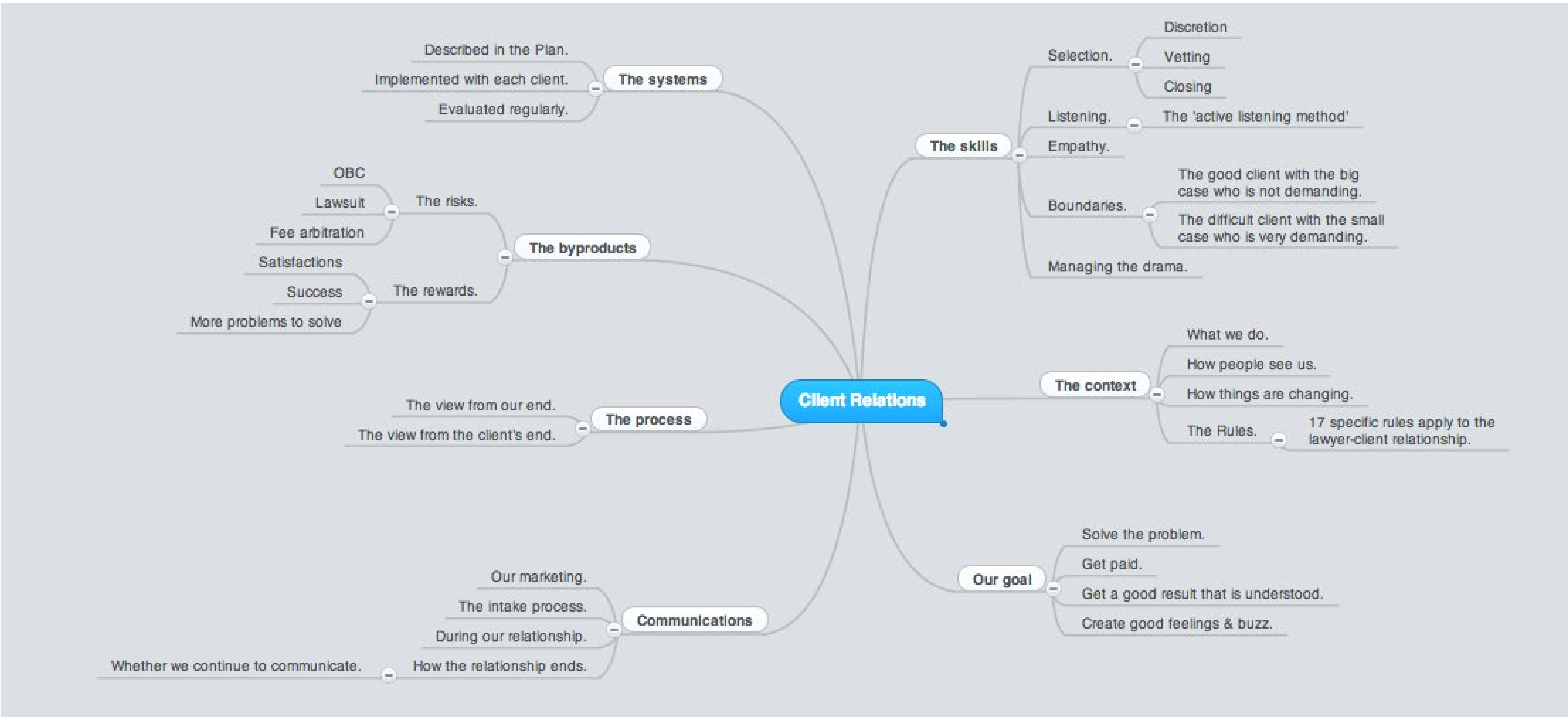
Client Relations

Successful Small Firm Practice Course

Session Six / October 25, 2021



Client Relations
The systems
Described in the Plan.
Implemented with each client.
Evaluated regularly.
The byproducts
The risks.
OBC
Lawsuit
Fee arbitration
The rewards.
Satisfactions
Success
More problems to solve
The process
The view from our end.
The view from the client's end.
Communications
Our marketing.
The intake process.
During our relationship.
How the relationship ends.
Whether we continue to communicate.
The skills
Selection.
Discretion
Vetting
Closing
Listening.
The 'active listening method'
Empathy.
Boundaries.
The good client with the big case who is not demanding.
The difficult client with the small case who is very demanding.
Managing the drama.
The context
What we do.
How people see us.
How things are changing.
The Rules.
17 specific rules apply to the lawyer-client relationship.
Our goal
Solve the problem.
Get paid.
Get a good result that is understood.
Create good feelings & buzz.

The context

"Lawyer"

"Legal profession"

trigger negative responses

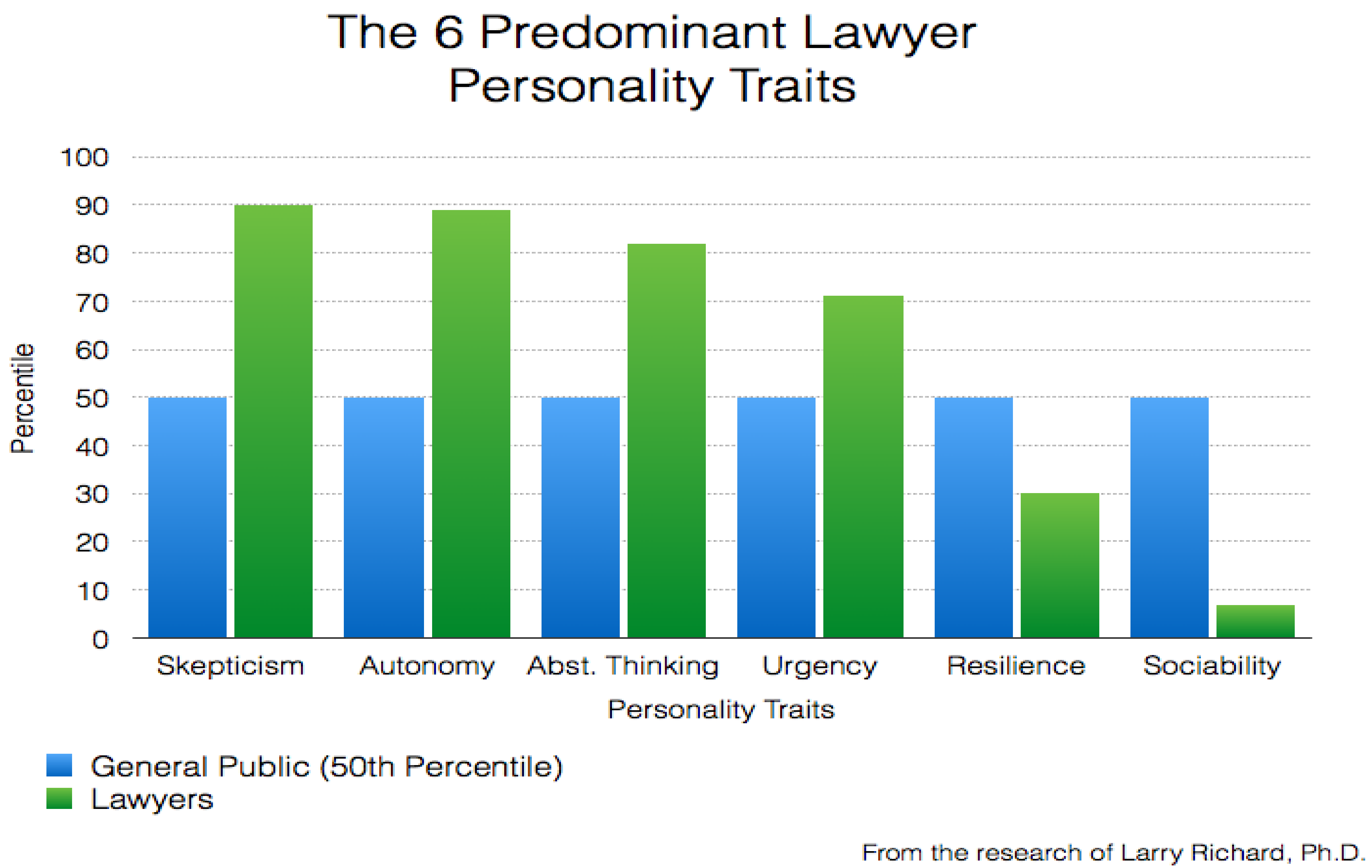
Until we are needed to solve a problem

Within the profession there is turmoil

Lawyers struggle with substance abuse at nearly twice the rate of the general population.

Lawyers lead the nation with the highest incidence of depression among 100 occupations.

And we solve other peoples' problems . . . .



[Dr. Larry Richard / LawyerBrain.com](http://LawyerBrain.com)

Often, the problem we solve is a piece of a bigger problem for the client

We work within a challenging context & profession

The goal

Solve our client's problem

Get paid

Get a knowably good result

Create good will

Stay healthy

The skills

Problem solving

Selection

Listening

Empathy

Boundaries

Management

To have good client relation, select only your ideal client

Vet the prospective client

Vet: to make a careful, critical examination; to assess, evaluate, screen

Research data bases & social media

Use Experian's service for lawyers

Ask for three months of bank statements

Charge an advance fee

Charge for the initial consultation

Charging for the initial consultation

Garner Law PLLC

60 Minute In-Office Consultation Session
Need advice on a legal issue? This session is designed to help you navigate your legal issue and includes review of your documents.
$200 USD
1 hour

60 Minute Online Consultation Session
Need advice on a legal issue? This session is designed to help you navigate your legal issue and includes review of documents. Documents must be sent electronically at least 1 hour prior to the session.
$200 USD
1 hour

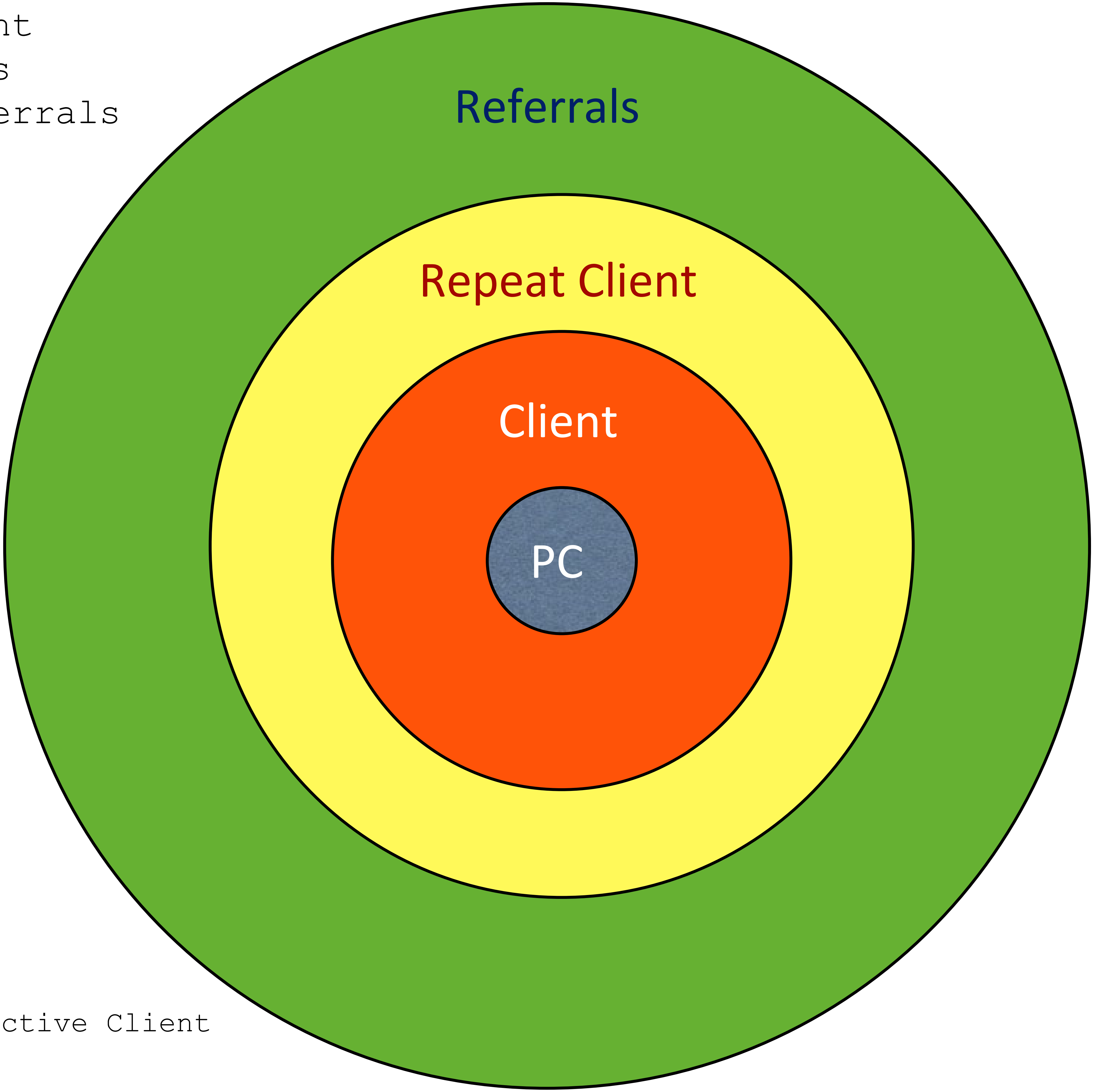
[Garner Law]

Start work in the client's presence

The client should “see” you solving their problem

Create a system for informing & educating the client throughout the matter

How client relations grow referrals



PC = Prospective Client

Survey the client both during and at the end of the representation.

What was the client’s experience?

SurveyMonkey

What does your client really want?

Gerber's six categories

(Chapter 15, page 104)

1. Tactile - direct communicator
2. Neutral - indirect (computer)
3. Withdrawal - ideas
4. Experimental - innovator
5. Transitional - dependable
6. Traditional - good deal

The E-Myth Attorney / Michael Gerber

Client Relations & the Business Plan

Working a good plan is a foundation for good client relations

Section V, Marketing - Clients, page 9

Section XI, Appendices - page 24
add "Lessons Learned"

Who is your ideal client

Why good client choice is vital

What are the characteristics of your ideal client?

Where are they & how do you talk to them?

Clients

Identify your targeted clients, their characteristics, and their geographic locations, otherwise known as their demographics.

You may have more than one client group. Identify the most important groups. Then, for each client group, construct what is called a demographic profile:

- Age
- Gender
- Location
- Income level
- Social class and occupation
- Education
- Other (specific to your industry)
- Other (specific to your industry)

For commercial clients, the demographic factors might be:

- Industry (or portion of an industry)
- Location
- Size of firm
- Quality, technology, and price preferences
- Other (specific to your industry)
- Other (specific to your industry)

The business decision you make:

Taking anyone & everyone who walks in the door

or

Being selective and discerning

When you need to close

Are you talking to the decision maker?

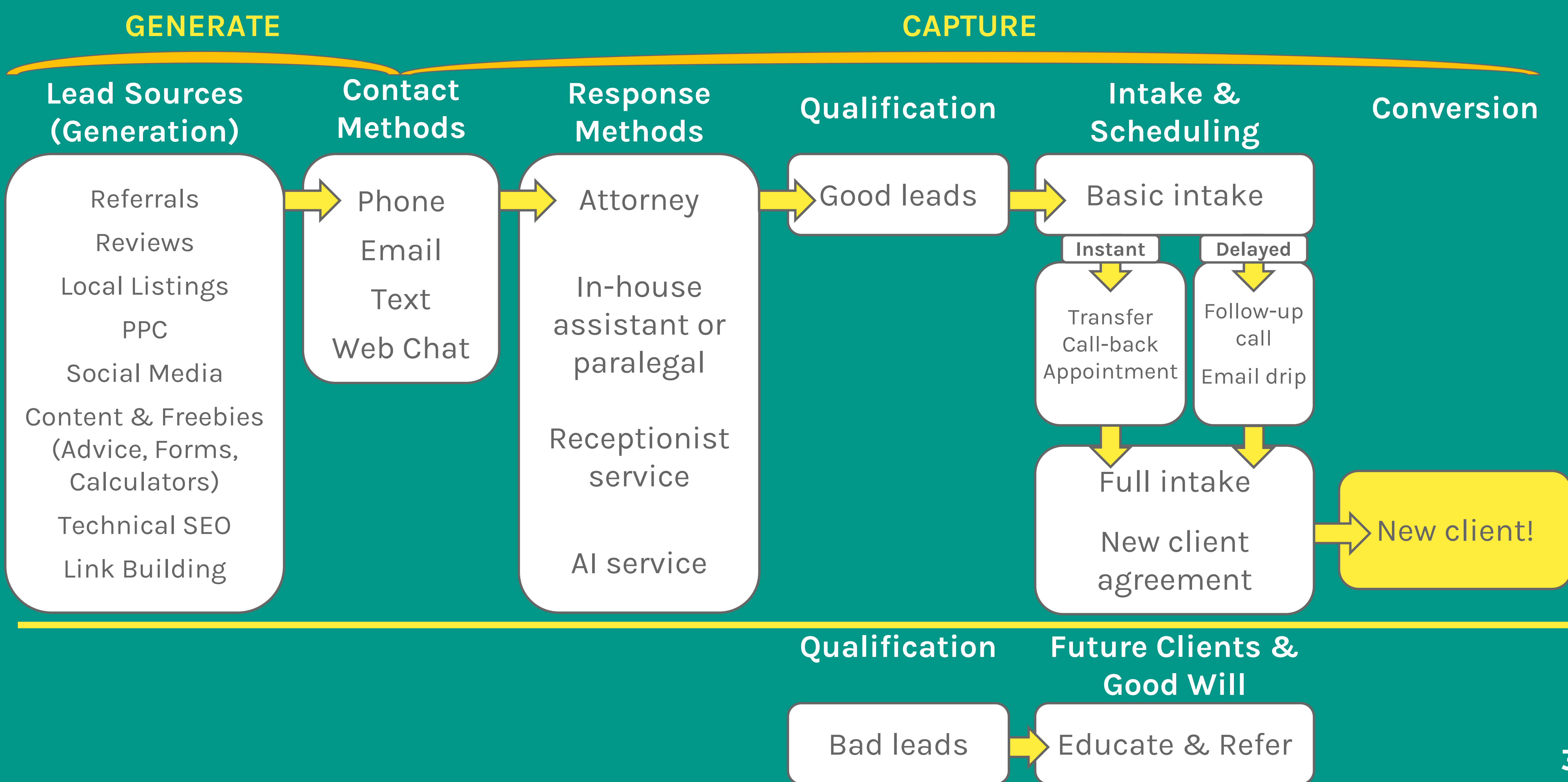
Can you solve this problem?

Are there contingencies?

Ask for the work.

LEAD CONVERSION FLOW

smith



Request the sample intake form at PMAS@dcbar.org

Sample Intake Form:

The purpose of an initial consultation is for the attorney to advise you, the *prospective* client what if anything, may be done for you, and what the minimum fee therefor will be. *The purpose is not to render a definitive legal opinion* as it may be impossible to fully assess a matter within the time frame allotted for a consultation or with the (information or documents) that you may be able to provide at the initial consultation.

One of three outcomes is possible following your consultation.

A. You and the Attorney mutually agree to the terms of representation, or (After a separate document called an Agreement for Representation is signed a copy will be provided to you.)
B. The Attorney declines representation, or
C. You decide not to use the services of the Attorney.

Note: The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name ____
Last First Middle or Maiden

Address ____
Number **Street** **City** **State** **Zip**

Home Phone (_____) ______________

Learning how the new client found you is only part of what you need to know.

You also want to know how they processed the problem that they are bringing to you for solution.

Why is the client’s *problem recognition process* important?

The challenging client

- Allow for sufficient time & attention
- Document the effort; (This becomes part of the client file: LEO 333)
- If you need to withdraw: Rule 1.16(b)

Real listening

How it works

Why it works

The problem we are solving
has an emotional component

Client expectations

What are they?

How do we address them?

A big factor in satisfied clients
who will refer new clients

Setting Boundaries

- It starts at intake & is reflected in the fee agreement
- Some client have to be trained & reminded
- Boundaries keep us professional
- The lawyer who takes no unscheduled calls

The New Client Checklist

- Am I competent & efficient?
- Is this an ideal client?
- Is this work in my Plan?
- Will the fee be reasonable now, during & at the end of the representation?
- Are expectations addressed?
- Can I finish the work?
- Will I need help?

Clients to avoid

The liar

Exquisitely angry client

Serial litigant who is pro se or has fired counsel

The unrealistic person

The person who ignores boundaries & directions

The person who does not value your effort

The person with the *unsolvable* problem

You are on thin ice when . . .

- You are working outside your expertise
- You are too busy or afraid to communicate
- Your office is chaos and client data is exposed
- Your invoices are inaccurate
- You have big receivables & sue to collect fees
- You take on new work just to cover overhead
- You represent friends & family for free

Evaluate your client's experience

Request our *Client Satisfaction Survey Form*
From PMAS@dcbar.org

Use SurveyMonkey.com

More information on *Client Relations* is at
Page 77, e-Manual

How to avoid a problem using a survey

When staff have significant client contact, survey the client both during and at the conclusion of the representation.

Encourage feedback about how the client is being handled.

Make sure the survey results come to you.

Here’s what to ask

- What What should we keep doing?

What should we stop doing?

What did we not do that we should do?

Staff

How to determine the need

Determining the cost

Formula for determining true cost

Keep payroll well below 50% of revenue

Hiring resources

[Mechanics of hiring]

[eGuide to hiring]

[Payroll options]

How to hire & manage employees

[SBA Guide]

[LawHelp/DC employment issues]

How do you respond to a prospective client who shows up with this?

Next assignment: Complete the Clients section of your business plan

Page Nine of the Business Plan Template

Clients

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Reason #11 Why Every Parent **Needs** An Estate Plan

Your daughter, Isabella

- Waved to you from the stage throughout her first appearance in the Nutcracker this past year.
- Wants to be a veterinarian when she grows up (either that or Cinderella).
- Loves to hike (in her tutu).
- Still falls asleep in your lap.

How important is ***her*** future?

FREE Estate Planning Educational Event

Wednesday, October 12, 2011
6:00pm

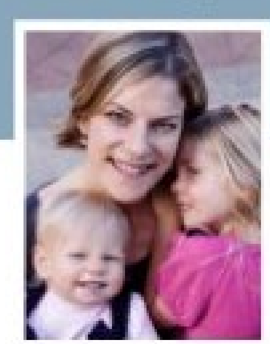
OR

Saturday, October 15, 2011
3:00pm

Mill Valley Community Center • Forest Room • 180 Camino Alto • Mill Valley

Seating is limited. Register today at **www.TheaLaw.com**
or call: **415-451-0123**

*We strongly recommend both parents attend. **FREE CHILDCARE FOR EVENT!**



Thea Beatie Eliot
Attorney at Law and local mom

THEA LAW
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Protect what you love.

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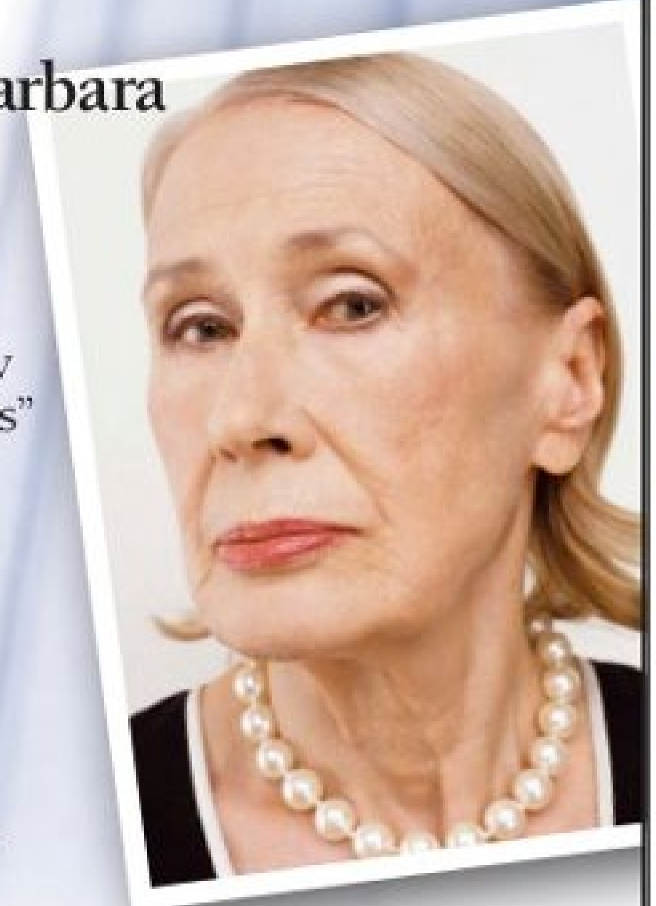
www.TheaLaw.com

Reason #5 To Name Guardians For Your Kids

Your mother-in-law, Barbara



- Offers you lots of free parenting advice
- Thinks the answer to all baby problems is “more solid foods”
- Most important values are family and carpeting
- Believes in “spare the rod, spoil the child”
- Would do a much better job than you if given the chance.

Are you sure the court won’t assign guardianship of your children to *her*?

Call Today For Your ***Free Parent’s Protection Planning Guide***: (415)451-0123 or visit www.TheaLaw.com

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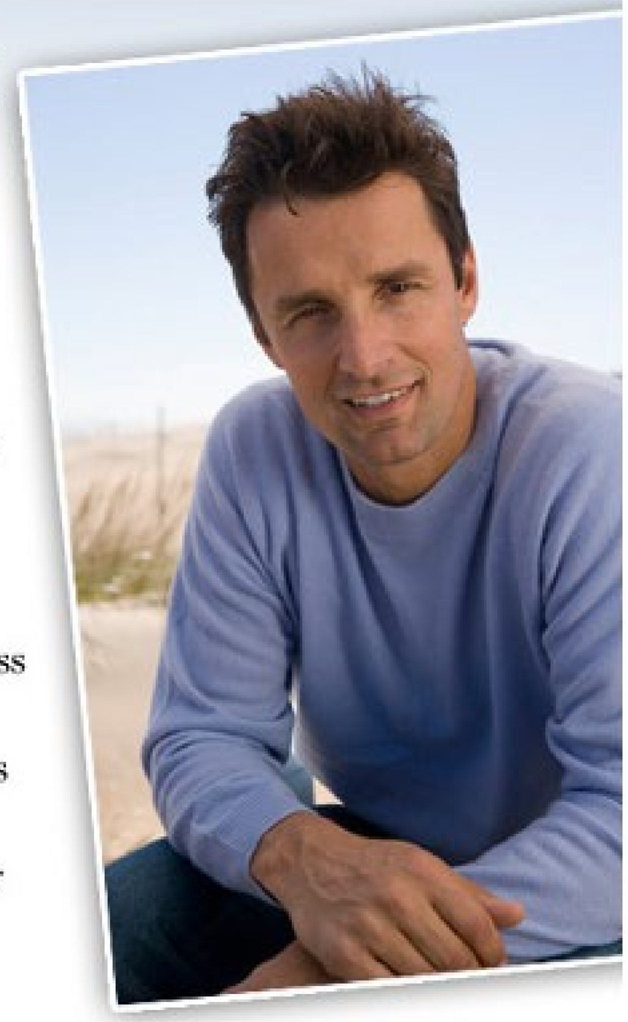
Reason #6 To Get A Divorce

Your husband, Alex

- Helps with the dishes, then acts like he should get a medal
- Sheds so much hair, your bathroom floor looks like it has a rug on it
- For Christmas, gave you a dual-bag vacuum cleaner
- Main occupation in life is watching endless hours of sports on TV
- Refers to your favorite sushi restaurant as "the bait shop"
- While out to dinner with you and another couple, likes to hit on the waitresses
- Or your best friend



Are You Sure You Want To Stay Married?

Call Today For A Complimentary and Confidential Divorce Consultation: 626.683.8869

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